### Atty Istanboulian, Flora (for Theodora Michaelides – Conservator – Petitioner)

(1) Third Account and Report of Conservator; (2) Petition for Allowance of Fees to Attorney for Conservator; (3) for Reimbursement of Expenses to Conservator; and (4) for Reduction of Bond [Prob. C. 2620, 2640, 2430, 2329]

Age: 93			THEODORA MICHAELIDES, Conservator, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	
			Account period: 4-1-10 through 9-30-12	Note: The conservatee's residence was sold recently for a loss of \$178,564.09 (from the carry value).
	Aff.Sub.Wit.		Accounting: \$ 414,401.49 Beginning POH: \$ 324,459.27	Note: Grey highlight indicates updates.
_	Verified		Ending POH: \$ 55,016.40 (cash)	The Court may require clarification
	Inventory			regarding the amounts listed on
	PTC		Conservator: \$558.27 (reimbursement for	Disbursements Schedule C1 for hair care, as the amounts appear to be
	Not.Cred.		funds advanced for food and grooming items for the Conservatee and plumbing	rather high. (e.g., \$485 on 10-10-11 and
~	Notice of Hrg		fees in connection with the residence)	\$440 on 9-18-12 – Are these payments
~	Aff.Mail	W	,	for individual services or a time frame?)—Declaration filed 12/3/2012
	Aff.Pub.		Attorney: \$1,575.00 (itemized)	explains the amounts noted reflected
	Sp.Ntc.		Petitioner states the current bond filed 3-19-	an unpaid balance owed to hairstylist
	Pers.Serv.		07 in the amount of \$304,000.00 is excessive	for services (itemized bill attached for clarification.)
	Conf. Screen		and requests that the bond be reduced to	
	Letters		\$83,000.00, which includes POH, income,	The Court may require clarification regarding overdraft and NSF charges in
	Duties/Supp		and cost of recovery.	Sept. 2010 and Aug. 2012. —Declaration
	Objections		Petitioner requests an order approving,	filed 12/3/2012 explains that during the
	Video		allowing and settling the account and report,	account period the Conservatee's expenses exceeded her monthly
-	Receipt		authorizing reimbursement to the	income while awaiting real property
Ť	CI Report		Conservator as requested, authorizing the	sale completion.
Ť	2620(c) Order		attorney fees, and reducing the bond to \$83,000.00.	~Please see additional page~
Ě	Aff. Posting		<b>400,000.00.</b>	Reviewed by: skc / LEG
	Status Rpt			Reviewed by: 3RC / ELG
	UCCJEA			Updates: 12/3/12
	Citation			Recommendation:
	FTB Notice			File 1 - Mitchell

## Additional Page 1, Ann Mitchell (CONS/PE)

Case No. 07CEPR00094

#### NEEDS/PROBLEMS/COMMENTS, continued:

- 3. The Court may require clarification regarding the two check printing charges on the same date (4-18-11) for \$35.60 and then \$156.66. —Declaration filed 12/3/2012 explains these charges were automatically debited by the bank for printing checks and check supplies including conservatorship bank ledger book, as shown on confidentially filed bank statements.
- 4. It appears from the accounting that payments to the care home fell behind in August 2011, until June 2012 when the Conservator advanced funds to pay the \$28,000.00 that had accrued. The Court may require clarification or further information. —Declaration filed 12/3/2012 explains that during the account period the Conservatee's expenses exceeded her monthly income while awaiting real property sale completion.

Note: If petition is granted, Court will set status hearings as follows:

- Friday, January 11, 2013 at 9:00 a.m. in Dept. 303, for filing proof of reduced bond; and
- Friday, February 16, 2015 at 9:00 a.m. in Dept. 303, for filing of the fourth account.

Atty Matlak, Steven M. (for Joseph Pedemonte – beneficiary/Petitioner)
Petition to Reduce Bond

			JO	SEPH PEDEMONTE, beneficiary, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
			Pe	titioner states:	COMMILITIS.
			1.	On 03/09/11, Petitioner filed a Petition to Appoint Successor	
			1	Trustee in order to appoint Robert S. Swanton as Successor	
	nt. from		1	Trustee of the AUGUSTINE J. PEDEMONTE TRUST dated	
			ł	04/13/83 (the "Trust"), without bond. Petitioner is the sole	
	Aff.Sub.Wit.		2.	income beneficiary of the Trust during his lifetime. Petitioner's daughters, Nina Helgeson, Maria Pedemonte,	
✓	Verified		۷.	and Augustina Pedemonte are remainder beneficiaries of	
	Inventory			the Trust. The daughters objected to the appointment of	
	PTC			Robert S. Swanton as Successor Trustee of the Trust and	
			1	objected to the waiver of bond.	
	Not.Cred.		3.	Petitioner and his daughters agreed to the appointment of	
<b>√</b>	Notice of Hrg			Bruce Bickel as Successor Trustee with bond in the amount	
✓	Aff.Mail	w/	4.	of \$3,496,544.24. The Trust owns 100 shares in Pedemonte Properties, Inc. and	
	Aff.Pub.		]	100 shares of Maria-Nina Investment Company, Both	
	Sp.Ntc.		1	companies own interests in commercial real estate	
			ł	property. The trust owns no other assets.	
	Pers.Serv.		5.	When bond was initially set, the bond was based on the	
	Conf. Screen			value of the Trust's interest in the commercial real estate	
	Letters			property. However, that value was not discounted for the Trust's interest as a minority shareholder.	
	Duties/Supp		6.	Bond in the amount of \$3,496,544.24 resulted in a bond	
	Objections		1 .	premium of \$8,741.00 per year for the Trust and the Trust	
			ł	does not have the liquidity to continue to pay the premium.	
	Video		7.	Petitioner and his daughters, who are all adult beneficiaries	
	Receipt			of the Trust, have all now agreed that it is in their best interest	
	CI Report			as beneficiaries of the Trust to see the bond reduced in light of the high cost of the bond premium.	
	9202		8.	Mr. Bickel, the current Trustee, also consents to the reduction	
✓	Order		J .	in bond.	
	Aff. Posting		9.	The Trustee and all beneficiaries have agreed that a	Reviewed by: JF
	Status Rpt			reduction in bond to \$250,000.00 would be appropriate.	Reviewed on:
	sidius ripi		10.	Probate Code § 15602(b) allows the Court to "excuse a	11/28/12
	UCCJEA		1	requirement of a bond, reduce or increase the amount of the bondThe Court may not, however, excuse the	Updates:
	Citation			requirement of a bondexcept under compelling	Recommendation:
				circumstances. For the purposes of this section, a request by	
	FTB Notice			all the adult beneficiaries of a trust that bond be	File 2 - Pedemonte
				waivedfor their trust is deemed to constitute a compelling	
				circumstance."	
			Po	titioner prays for an Order:	
			' ਦ	1. Reducing the amount of bond required to \$250,000.00	
				as already issued; and	
				2. Reducing the bond retroactive to the date of the	
				bond's inception on 02/14/12.	

# Susan Pedemonte Trust (Trust) Matlak, Steven M. (for Joseph Pedemonte – beneficiary/Petitioner) Atty Petition to Reduce Bond

	JOSEPH PEDEMONTE, beneficiary, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
	Petitioner states:	
	11. On 03/09/11, Petitioner filed a Petition to Appoint	
	Successor Trustee in order to appoint Robert S. Swanton as	
Cont. from	Successor Trustee of the SUSAN M. PEDEMONTE TRUST dated 04/13/83 (the "Trust"), without bond. Petitioner is the	
Aff.Sub.Wit.	sole income beneficiary of the Trust during his lifetime.	
	12. Petitioner's daughters, Nina Helgeson, Maria Pedemonte,	
✓ Verified	and Augustina Pedemonte are remainder beneficiaries of	
Inventory	the Trust. The daughters objected to the appointment of	
PTC	Robert S. Swanton as Successor Trustee of the Trust and	
Not.Cred.	objected to the waiver of bond.  13. Petitioner and his daughters agreed to the appointment	
✓ Notice of Hrg	of Bruce Bickel as Successor Trustee with bond in the	
	amount of \$3,496,544.24.	
✓ Aff.Mail w/	14. The Trust owns 100 shares in Pedemonte Properties, Inc.	
Aff.Pub.	and 100 shares of Maria-Nina Investment Company. Both	
Sp.Ntc.	companies own interests in commercial real estate property. The trust owns no other assets.	
Pers.Serv.	15. When bond was initially set, the bond was based on the	
Conf. Screen	value of the Trust's interest in the commercial real estate	
Letters	property. However, that value was not discounted for the	
<del>                                   </del>	Trust's interest as a minority shareholder.	
Duties/Supp	16. Bond in the amount of \$3,496,544.24 resulted in a bond	
Objections	premium of \$8,741.00 per year for the Trust and the Trust does not have the liquidity to continue to pay the	
Video	premium.	
Receipt	17. Petitioner and his daughters, who are all adult	
CI Report	beneficiaries of the Trust, have all now agreed that it is in	
9202	their best interest as beneficiaries of the Trust to see the	
√ Order	bond reduced in light of the high cost of the bond premium.	
	18. Mr. Bickel, the current Trustee, also consents to the	Reviewed by: JF
Aff. Posting	reduction in bond.	
Status Rpt	19. The Trustee and all beneficiaries have agreed that a	<b>Reviewed on:</b> 11/28/12
UCCJEA	reduction in bond to \$250,000.00 would be appropriate.	Updates:
Citation	20. Probate Code § 15602(b) allows the Court to "excuse a requirement of a bond, reduce or increase the amount of	Recommendation:
FTB Notice	the bondThe Court may not, however, excuse the	File 3 - Pedemonte
	requirement of a bondexcept under compelling	
	circumstances. For the purposes of this section, a request	
	by all the adult beneficiaries of a trust that bond be	
	waivedfor their trust is deemed to constitute a	
	compelling circumstance.''	
	Petitioner prays for an Order:	
	3. Reducing the amount of bond required to \$250,000.00	
	as already issued; and	
	4. Reducing the bond retroactive to the date of the	
	bond's inception on 02/14/12.	

# 4 Nathaniel Allen Chandler (GUARD/P) Atty Campbell, Catherine (for Terri Nelson – maternal

Case No. 11CEPR00196

Campbell, Catherine (for Terri Nelson – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ag	e: 13		TEMPORARY EXPIRES 12/04/12	NEEDS/PROBLEMS/COMMENTS:
			<b>TERRI NELSON,</b> maternal grandmother, is Petitioner.	CONTINUED FROM 11/06/12  1. Need proof of personal service at least 15 days before the hearing of
<ul><li>Co</li><li>✓</li><li>✓</li><li>✓</li></ul>	Aff.Pub. Sp.Ntc.	w/ x	Father: JOHN SCOTT CHANDLER – currently incarcerated; Consent & Waiver of Notice filed 09/24/12  Mother: TRISHA NELSON CHANDLER – served by mail on 11/07/12  Paternal grandfather: THOMAS W. CHANDLER – Served by mail on 11/07/12  Paternal grandmother: SANDY CHANDLER – served by mail on 11/07/12  Maternal grandfather: LARRY NELSON - deceased	Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for:  - Trisha Nelson Chandler (mother) *A proof of service was filed 11/07/12 indicating that the mother was served by mail on 11/07/12; however, service by mail is insufficient to a parent.
✓ ✓	Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Petitioner alleges that the minor's father is currently incarcerated and his mother is a drug user, has violent mood swings, and is abusive to both herself and the minor. The minor's mother threatens to remove the minor from petitioners home, where he has lived the majority of his life. The minor is suffering from his mother's emotional abuse and is having trouble in school. Petitioner states that the minor has expressed to her that he does not want to live with his mother and is afraid of her. Petitioner states that she believes the minor needs counseling to help cope with all of the abuse his mother has put him through.	Reviewed by: JF Reviewed on: 11/28/12 Updates: Recommendation: File 4 - Chandler
			Court Investigator Charlotte Bien filed a report on 10/16/12.	

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# 5 Eustacio Perez (CONS/PE)

Case No. 11CEPR01013

Atty Perez, Holley H., of Perez Williams Medina & Rodriguez (for Petitioner Robert F. Perez, Conservator)

(1) First Amended Petition for Termination of Conservatorship Proceedings, (2) Final Account Current and Report of Conservator and (3) Petition for Settlement and Distribution (Prob. C. 1860, 1861, 2620, 2623, 2625, 2630, 2640 & 2642)

DOD: 1/20/2012		ROBERT F. PEREZ, son and Conservator of the Person		NEEDS/PROBLEMS/COMMENTS:		
			and Estate, is Petitioner.  Account period: 12/1/2010 – 1/20/2012		Continued from 11/5/2012. No issues remain to be addressed.	
			Accounting		\$244,855.60	issees terriain to be addressed.
Со	nt. from 110512		Beginning POH	- \$175,574	•	
	Aff.Sub.Wit.		Ending POH	-	\$184,507.82	
✓	Verified					
	Inventory		Subsequent Account pe	eriod: 1/20/2012 -	7/31/2012	
	PTC		Accounting		\$190,193.28	
	Not.Cred.		Beginning POH	- \$184,507		
<b>√</b>	Notice of Hrg		Ending POH		<b>\$187,532.03</b> .03 is cash)	
<b>✓</b>	Aff.Mail	W/		(φυ4,202	.03 is Casi ij	
<b>√</b>	Vetern Notc		Conservator	-	waives	
	Sp.Ntc.		Attornov		waives	
	Pers.Serv.		Attorney	_	waives	
	Conf. Screen		Petitioner states:			
	Letters		<ul> <li>On 5/9/2011, the 1</li> </ul>	,	•	
	Duties/Supp		approved and se			
	Objections		Report of Conserv was transferred to		•	
	Video		Approving Transfe	•		
	Receipt		Proceedings to Fre		•	
	CI Report		<ul> <li>Since the death o</li> </ul>	•		
✓	9202		1/20/2012, Petition	•		
✓	Order		Code § 2623(a)(5	•	•	
	Aff. Posting		reasonable exper		the custody	Reviewed by: LEG
	Status Rpt		<ul><li>and conservation</li><li>On 5/24/2012, Pet</li></ul>		ointed Exacutor	<b>Reviewed on:</b> 11/29/12
	UCCJEA		<ul> <li>On 5/24/2012, Pet of the deceased</li> </ul>			Updates:
	Citation					Recommendation:
	FTB Notice		#12CEPR00330, and <i>Letters</i> issued on that date;			File 5 - Perez
			~Please se	ee additional po	age~	

#### Petitioner states, continued:

- The Conservatee's former residence is located on property in Orosi, CA, that is adjacent to property owned by Petitioner, and the two residential structures were at one time located on the same parcel of land, built close together as they were inhabited by the extended family unit; the Conservatee's structure was the home of the Conservatee prior to 1999 and prior to his moving to the Vintage Gardens assisted living facility in 2009; the other structure now owned by Petitioner was the home of Petitioner's grandparents, the Conservatee's in-laws; the Conservatee resided in the in-laws' home after 2000, and the Conservatee's residential property remained undisturbed and vacant until 2007, when it was rented to the current tenant; from 2001 until 2009, the Conservatee continued to live in the in-laws' home (now Petitioner's property) rent free; both properties are serviced by two different PG&E utility accounts, one of which has an electrical water well pump utility service account designated as an agricultural well pump used to irrigate a small orange tree grove existing on the property; while the Conservatee lived in the property owned by Petitioner, the Consevatee paid both PG&E utility bills from that property, and also paid the PG&E agricultural well pump utility bill for the property that he owned because he was maintaining irrigation to the existing orange trees separate and apart from the tenant's rental of the residential structure on that property; after the Conservatee moved to the assisted living facility, he continued to pay only the PG&E agricultural well pump utility bill for the property that he owned in order to maintain irrigation to the existing orange trees; each check written out of Conservatee's account for PG&E utility bills contains a memo identifying the correct account number;
- The Conservatee's real property residence located in Orosi is currently occupied by and has been occupied by the same tenant since 12/2007, with \$900.00 per month of rent paid by the tenant; originally the lease agreement was also an option to purchase the property, and the tenant hoped to buy the property but has not yet been able to qualify for financing due to his being unable to work based on health issues and later being laid off from his job; the tenant has been unable to pay the full amount of rent, and Petitioner has been working with the tenant for payment of the past owed rent while continuing to pay current monthly rent;
- Petitioner spent well over 500 hours providing service to the Conservatee beyond paying monthly bills, including visits and/or calls to the Conservatee ~2 times per week, transportation for medical care and other purposes, family celebrations, and travel to Los Angeles for family reunion every year; Petitioner also gave to Conservatee from his own funds spending money of \$2,550.00 [outlined in Petition with dates and amounts of money from Conservator's funds];
- Petitioner marshaled all Conservatorship assets, which was a problem because the Veterans Administration did
  not recognize the existence of the conservatorship created under California law, and was requiring Petitioner to
  apply separately to its fiduciary program before allowing Conservatee's benefits to be deposited into
  Conservatorship bank account without Conservatee personally authorizing such a change, and the
  Conservatee at that time would not personally authorize his VA benefits to be directly deposited into the
  Conservatorship account;
- After establishment of the Conservatorship, Petitioner opened a Conservatorship Bank of America account
  because he wanted a bank that did not contain any of his or his wife's (Attorney Holly Perez) funds or the funds
  of his law firm; the Conservatee was allowed by Union Bank, where an account had been opened for him by
  Petitioner for the purpose of continuing automatic deposits of VA benefits until they could be transferred to the
  Conservatorship account, to make unauthorized withdrawals from the account without the knowledge of or
  authorization from the Petitioner; Conservatee remembered withdrawing and spending some of the money,
  but did not remember many of the disbursements and could not remember what the money was actually
  used for (please refer to Schedule G);

~Please see additional page~

## Second Additional Page 5, Eustacio Perez (CONS/PE)

### Case No. 11CEPR01013

#### Petitioner states, continued:

• Beginning with 8/2011, Conservatee's VA benefit checks were received at Petitioner's address, which Petitioner periodically deposited into the Bank of America conservatorship account; Petitioner has in his possession the VA benefit checks for Conservatee's 11/2011, 12/2011 and 1/2012 benefits, which were not deposited into the Bank of America conservatorship account because the Conservatee did not sign them prior to his death; Schedule A Receipts does not include the 11/2011 and 12/2011 checks because Petitioner is not sure that these checks will be re-issued by VA in the name of the deceased Consevatee's estate; the 1/2012 VA benefit check has not been included in Schedule A Receipts because according to the VA rules, Conservatee was not entitled to benefits for the month of his death, and Petitioner believes VA has probably already stopped payment for the 1/2012 benefit check.

## Petitioner prays for an Order:

- 1. Terminating the Conservatorship proceedings;
- 2. Approving and settling the Final Account and Report, and approving the acts of the Conservator shown in the Account and Report; and
- 3. Authorizing the Conservator to distribute and transfer all funds and assets of the Conservatorship estate to himself as the court-appointed Executor of the deceased Conservatee's Estate (Case #12CEPR00330).

# 6 Thomas Sanchez (Det Succ)

Case No. 12CEPR00797

Atty Durost, Linda K. (for Petitioners, Gloria Maldonado, Andrew Sanchez & Teresa Gooding)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 7/23/2007		GLORIA MALDONADO, ANDREW SANCHEZ	NEEDS/PROBLEMS/COMMENTS:		
		and TERESA GOODING as Administrator of			
		the Estate of NORMA SANCHEZ, are	Continued from 10/29/12. As of		
		petitioners.	11/29/12 the following issues remain	n:	
Со	nt. from 102912	40 days since DOD.	_		
	Aff.Sub.Wit.	10 00/00/100 000/1	Inventory and Appraisal was not		
<b>√</b>	Verified	No other proceedings.	signed by all petitioners.		
<b>√</b>	Inventory	Decedent died intestate.	2. Inventory and appraisal indicate the	at	
<b>✓</b>	PTC	I & A - \$60,000.00	it is a supplemental Inventory and Appraisal and Reappraisal for Sale.	ln	
	Not.Cred.	1 4 1 - \$00,000.00	addition #3 indicates that the		
/	Notice of		property listed is a portion of the		
Ľ	Hrg	Petitioners request Court determination that	estate. Pursuant to Probate Code §13151 this summary proceeding		
✓	Aff.Mail	Decedent's interest in real property located at 4162 E. Clay Ave., in Fresno passes to	may only be used if the gross value	of	
	Aff.Pub.	them in equal shares pursuant to intestate	the decedent's real and personal		
	Sp.Ntc.	succession.	property in this state does not excee \$150,000.00. Need inventory and	ed	
	Pers.Serv.	3000033011.	appraisal that includes all the		
	Conf.		property of the decedent located i	n	
	Screen		this state.		
	Letters			٦	
	Duties/Supp		<ol><li>Petition states the decedent's date death was 7/23/2007. The inventor</li></ol>		
	Objections		and appraisal lists the decedent's	<i>'</i>	
	Video		date of death as 7/25/2007.		
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting		Reviewed by: KT		
	Status Rpt		Reviewed on: 11/29/12		
	UCCJEA		Updates:		
	Citation		Recommendation:		
	FTB Notice		File 6 - Sanchez		

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Troy Dewayne Phillips (Estate)
Marshall, Jared C. (for Richard DeWayne Phillips – Father – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

	C. 8002, 10430)						
DOD: 2-14-12			RICHARD DEWAYNE PHILLIPS, Father, is	NEEDS/PROBLEMS/COMMENTS:			
			Petitioner and requests appointment as				
			Administrator with Full IAEA without bond.				
	nt. from 102312		The sole heir nominates Petitioner and				
	Aff.Sub.Wit.		waives bond.				
<b>-</b>			Full IAEA – ok				
Ě	Verified		I OII IALA – OK				
	Inventory		Decedent died intestate				
	PTC		Deceder if alea it fleshale				
	Not.Cred.		Residence: Fresno				
<b>&gt;</b>	Notice of		Publication – Fresno Business Journal				
	Hrg						
<b>&gt;</b>	Aff.Mail	×	Estimated value of estate: \$0.00				
<b>&gt;</b>	Aff.Pub.		D 1 1 D 1 D 11 D 11				
	Sp.Ntc.		Probate Referee: Rick Smith				
	Pers.Serv.						
	Conf.						
	Screen						
>	Letters						
	Duties/Supp						
	Objections						
	Video						
	Receipt						
	CI Report						
	9202						
~	Order						
	Aff. Posting			Reviewed by: skc			
	Status Rpt			<b>Reviewed on:</b> 11-28-12			
	UCCJEA			Updates:			
	Citation			Recommendation: SUBMITTED			
	FTB Notice			File 7 – Phillips			

Mary Jane Siverly (Det Succ)
Marchini, Richard T. of Merced, CA (for Petitioners)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 07/18/09	THOMAS W. SIVERLY, ANITA S.	NEEDS/PROBLEMS/COMMENTS:
	WIDMAYER, JAMES R. SIVERLY, HARRY D. SIVERLY, PATRICIA DIVELBISS, and MARY ANN FOSTER, children of Decedent, are	CONTINUED FROM 11/19/12
Cont. from 110112,	Petitioners.	
✓ Aff.Sub.Wit.	40 days since DOD.	
✓ Verified Inventory	No other proceedings.	
PTC Not.Cred.	I & A - \$87,077.53	
✓         Notice of Hrg           ✓         Aff.Mail         W/	Will dated 04/06/01 devises estate to	
Aff.Pub.	decedent's six living children equally.	
Pers.Serv. Conf. Screen	Petitioners request court determination that decedent's 100% interest in real	
Letters	property located at 3627 E. Pine	
Duties/Supp Objections	Avenue, Fresno and 100% interest in a Schwab One bank account pass to	
Video Receipt	them in equal shares pursuant to decedent's Will.	
CI Report 9202		
✓ Order Aff. Posting		Reviewed by: JF
Status Rpt UCCJEA		Reviewed on: 11/28/12 Updates:
Citation FTB Notice		Recommendation: SUBMITTED  File 8 - Siverly

# 9 James William Robinson (Estate)

Case No. 12CEPR00854

Atty Lewis, Glen R (for Atascadero, for Petitioner Arley R. Robinson)

Amended Petition for Probate of Will and for Letters of Administration with Will

Annexed;

Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 7/27/12	ARLEY R. ROBINSON, named	NEEDS/PROBLEMS/COMMENTS:
		executor, is petitioner and	
		requests appointment with	<b>Note:</b> If the petition is granted, status
		bond set at \$200,000.00.	hearings will be set as follows:
Со	nt. from 110112	φ_σσ,σσ,σσ,σσ	Ğ
✓	Aff.Sub.Wit.	Full IAEA – o.k.	• Friday, January 4, 2013 at 9:00 a.m. in Department 303, for the filing of the
✓	Verified		bond.
	Inventory	Will dated: 4/9/2010	Friday, April 27, 2012 at 0,000 at no in
	PTC		Friday, April 26, 2013 at 9:00 a.m. in     Department 303, for the filing of the
	Not.Cred.	Residence: Fresno	inventory and appraisal.
	Notice of Hrg	Publication: Fresno Business	, ''
✓	Aff.Mail W/	Journal	Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first
✓	Aff.Pub.		account or petition for final distribution.
	Sp.Ntc.		D
	Pers.Serv.		Pursuant to Local Rule 7.5 if the required
	Conf. Screen	Estimated value of the estate:	documents are filed 10 days prior the date
✓	Letters	Personal property -\$ 20,000.00 Real property -\$180,000.00	set the status hearing will come off calendar and no appearance will be required.
✓	Duties/Supp	Total -\$200,000.00	
	Objections		
	Video		
	Receipt	Probate Referee: STEVEN DIEBERT	
	CI Report		
	9202	-	
✓	Order		
	Aff. Posting	]	Reviewed by: KT
	Status Rpt		Reviewed on: 11/30/12
	UCCJEA		Updates:
	Citation	_	Recommendation: SUBMITTED
	FTB Notice		File 9 - Robinson
			0

Pimentel, Paul J. (for Betty Rodgers – Trustee/Petitioner)

Petition to Remove Trustee and to Appoint Successor Trustee (Prob. C. 15642)

	cobert DOD: 05/16/07   BETTY RODGERS, Surviving Trustor and Co-Trustee, is   NEEDS/PROBLEMS/COMMENTS:				
RO	bert DOD: 05/16/0	_	TTY RODGERS, Surviving Trustor and Co-Trustee, is	NEEDS/	PROBLEMS/COMMENTS:
	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred.	Pe Pi 1. 2. 3.	etitioner states: She is the sole surviving Trustror and a Co-Trustee of the ROBERT LEWIS RODGERS AND BETTY IRENE RODGERS REVOCABLE LIVING TRUST dated 05/17/95 (the "Trust"). She is also the sole surviving beneficiary under the Trust. Susan Rodgers MacDonald ("MacDonald")	1. 2. 3.	The Petition does not identify those persons entitled to Notice as required pursuant to Probate Code § 17201.  Need Notice of Hearing.  Need proof of service by mail at least 30 days before the hearing of Notice of Hearing with a copy of the Petition
	Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA	4. 5.	upon the death of Robert Lewis Rodgers on 05/16/07 and confirmed with the recording of an Affidavit of Change of Trustee signed 07/10/07 and recorded 07/16/10 and have been acting as Trustees since no later than 07/10/07.  Petitioner requests the Court remove King as a Co-Trustee pursuant to its authority under Probate Code § 15642 because King, among other things:  a. Committed a breach of Trust by her failure to account for rents and income derived from Trust asset and properties;  b. She has refused to account for or return Trust property taken from Trust Real Property;	Review	pursuant to Probate Code § 17203.  The Petition requests that Bruce Bickel be appointed to serve with bond, however the Petition does not state the amount of bond required. The Court may require further information.
	Citation  FTB Notice		<ul> <li>c. Is hostile and/or otherwise creates a lack of cooperation among the trustees that impairs the administration of the Trust;</li> <li>d. She has consistently failed to communicate with the co-trustees concerning the management of Trust assets, thus impairing the management, maintenance and control of Trust assets;</li> <li>e. She has taken unilateral action with respect to Trust assets without consultation, discussion, review or approval by co-trustees;</li> <li>f. She has failed to act, and in doing so, she has failed to employ Trust assets to their best possible uses (e.g. rental property sits vacant); Continued on Page 2</li> </ul>		mendation: - Rodgers

# 10 Robert L. Rodgers & Betty I. Rodgers Trust 5-17-95 Case No. 12CEPR00931

Page 2

- g. She has used and/or controls Trust assets to the disadvantage of Petitioner, the sole remaining trustor and beneficiary of the Trust;
- h. She has failed to provide timely or complete tax information to tax specialists who are responsible for preparing Trust tax returns.
- 6. The Trust instrument does not appoint a successor Trustee. Petitioner requests that the Court appoint Bruce Bickel with bond as successor Trustee in accordance with paragraph XIV of the Trust. Bruce Bickel's consent to serve as Trustee is attached to the Petition.
- 7. Upon the appointment of Bruce Bickel as Successor Trustee, both Petitioner and MacDonald will resign as cotrustees and Mr. Bickel will serve as the sole Trustee.
- 8. Petitioner believes that Bruce Bickel's appointment as successor Trustee is in the best interest of the Trust and those persons interested in the Trust for the following reasons:
  - a. Mr. Bickel is a well-known, bonded fiduciary who has considerable experience as a Trustee and in managing Trusts;
  - b. Mr. Bickel will act in accordance with the Trust mandates and in the best interest of Petitioner, the sole surviving settlor and beneficiary.
  - c. Mr. Bickel is neutral and not aligned or affiliated with any current trustee.

## Petitioner prays for an Order:

- Removing Peggy Lynn Rodgers King as co-Trustee of the Robert Lewis Rodgers and Betty Irene Rodgers Revocable Living Trust Agreement dated May 17, 1995 and appoint Bruce Bickel as Successor Trustee to serve with bond; and
- 2. Ordering Peggy Lynn Rodgers King to file an accounting with the Court detailing her acts as trustee.

Bergin, Robert E., Jr. (for Carolyn K. Larsen – Beneficiary – Petitioner)

Petition for Appointment of Trustee to Fill Vacancy and for Distribution Instructions [Prob. C. 15660(d), 17200(b)(6) & 17200(b)(10)]

			CAROLYN K. LARSEN (formerly Kimble),	NEEDS/PROBLEMS/COMMENTS:
			beneficiary, is Petitioner.	
			Petitioner states the <b>JOSEPH KIMBLE</b>	
			TESTAMENTARY TRUST established in 1974	
	Aff.Sub.Wit.		provides for termination upon the death of	
	<u> </u>		Joseph Kimble's wife Sally Kimble and distribution to Petitioner outright. Sally Kimble	
>	Verified		died on 8-19-11. The trust does not provide a	
	Inventory		method of appointing a trustee therefore	
	PTC		this petition is necessary. Most of the trust	
	Not.Cred.		assets have been distributed; however,	
<b>&gt;</b>	Notice of		some assets, including certain oil and gas	
	Hrg		interests, remain undistributed and third	
<b>&gt;</b>	Aff.Mail	W	parties require documentation authorizing	
	Aff.Pub.		distribution.	
	Sp.Ntc.		Therefore, Petitioner is seeking appointment	
	Pers.Serv.		as successor trustee in order to formally	
	Conf.		transfer such assets.	
	Screen			
	Letters		Petitioner is the only beneficiary and the	
	Duties/Supp		only person entitled to notice of this petition.	
	Objections		Detitioner so als an order appointing her as	
	Video		Petitioner seeks an order appointing her as successor trustee and authorizing her as	
	Receipt		successor trustee and domonizing mends successor trustee to distribute any assets in	
	CI Report		the name of the trust to herself outright and	
	9202		free of trust.	
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 11-28-12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 11 - Kimble

Mary Alice Gann (Det Succ)

CHESTER, BRUCE C. (for Frank T. Gann and Charlotte D. Gann, Petitioners)

Petition to Determine Succession to Real Property and Personal Property (Prob. C. 13151)

	D. F 10 10		FRANK I CANIN and CHARLOTTER CANIN	NIFFDC /DDODLEAGC /COAAAGAITS
DO	D: 5-18-12		FRANK T. GANN and CHARLOTTE D. GANN,	NEEDS/PROBLEMS/COMMENTS:
			son and daughter, are Petitioners.	
			40 days since DOD	
			10 4475 311 100 100 100 100 100 100 100 100 100	
			No other proceedings	
	Aff.Sub.Wit.			
<b>~</b>	Verified		I&A: \$121,544.89	
<b>&gt;</b>	Inventory		(real property, cash, vehicle)	
	PTC		Decedent died intestate.	
	Not.Cred.		becode il died il liesidie.	
~	Notice of Hrg		Petitioners request Court determination that	
~	Aff.Mail v	w/o	Decedent's 100% interest in the real property,	
	Aff.Pub.		cash and vehicle passes to them (in	
	Sp.Ntc.		undivided 50% interests each) pursuant to intestate succession.	
	Pers.Serv.		il liestate soccession.	
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 11-29-12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 12 - Gann

Reimann, Nancy B. (of Los Angeles, for Julia N. Ueda and Steven D. Nishida, Trustees)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 11-7-11			JULIA N. UEDA and STEVEN D. NISHIDA, Co-	NE	EDS/PROBLEMS/COMMENTS:
			Trustees of the Fred R. Nishida and Haruye	١.	# / of the Delition is blowle And the one con-
			Nishida Trust U/T/D/ dated 9-20-89, are	1.	# 6 of the Petition is blank. Are there any proceedings for administration of the
			Petitioners.		Decedent's estate in California?
			40 days since DOD		If so, need consent of personal
	Aff.Sub.Wit.		10 00,700,1100 2 0 2		representative.—Supplement to Petition to Determine Succession to Real Property
~	Verified		1&A: \$150,000.00 (real property only)		filed 11/29/2012 explains Item 6(a) on
~	Inventory				Petition was inadvertently left blank; no
	PTC		Will dated 9-20-78 devises the residue of the		proceeding for administration of Decedent's estate is being or has been
	Not.Cred.		estate to the Fred R. Nishida and Haruye Nishida Trust.		conducted in California.
~	Notice of		1 101 1001		
	Hrg		Petitioners request that Decedent's 100%	2.	Need date of death of deceased spouse
>	Aff.Mail	W	interest in certain real property in Reedley,		per Local Rule 7.1.1.D—Supplement to Petition to Determine Succession to Real
	Aff.Pub.		CA passes to them as Co-Trustees of the		Property filed 11/29/2012 supplements
	Sp.Ntc.		Fred R. Nishida and Haruye Nishida Trust.		the Petition stating Decedent's spouse
	Pers.Serv.				predeceased him on 10/6/2010; copy of death certificate is attached.
	Conf.				
	Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
_	9202				
Ě	Order Aff Posting			Po	viewed by: skc / LEG
	Aff. Posting Status Rpt				viewed by: SKC / LEG viewed on: 11-29-12
	UCCJEA				dates: 12/3/12
	Citation			<u> </u>	commendation: SUBMITTED
	FTB Notice				e 13 - Nishida
<u> Ш</u>					13

Wright, Robert S. (for Rosario Ricardo Forestiere – Spouse – Petitioner)

Amended Ex Parte Petition for Letters of Special Administration with General Powers

DOD: 9-21-12	HEARING ON PETITION FOR LETTERS OF ADMINISTRATION IS SET FOR 1-3-13	NEEDS/PROBLEMS/ COMMENTS:	
	<b>ROSARIO RICARDO FORESTIERE</b> , Spouse, is Petitioner and requests appointment as Special Administrator without bond pending hearing on Petition for Letters of Administration set for 1-3-13.	Estimated value of estate: Real property valued at \$150,000.00	
Aff.Sub.Wit.  Verified Inventory PTC Not.Cred.  Notice of Hrg  Aff.Mail WAff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202  Order	Petitioner requests appointment as Special Administrator for the sole purpose of gaining access to the Decedent's home so that her personal papers can be reviewed and removed from the premises, if necessary for the proper administration of the decedent's estate.  Petitioner states: It is believed that one of the Decedent's children, Andre Forestiere, has been living in the Decedent's primary residence without payment of rent for several years prior to his mother's death. To date, Andre has refused to permit Petitioner or any other family member access to the Decedent's residence for the purpose of securing any financial records, inventorying any other potential assets, or searching for any will or estate plan documents.  At a family meeting between Petitioner and all of the children that took place shortly after the Decedent's death, Petitioner and the other children requested access to the property for the aforementioned reasons. Andre Forestiere refused and called the Fresno County Sheriff in an effort to prevent access. The sheriff responded to the call and, based on the fact that it had been 10 months since the Petitioner last resided at the property, the Sheriff refused any family access until proper Court recognition of authority is documented.  Therefore, Petitioner seeks appointment as Special Administrator so that a more timely and complete inventory of assets may be performed. Furthermore, Petitioner is concerned	Note: Decedent is survived by Petitioner (spouse) and six adult children. All were mailed Notice of Hearing for this hearing date.  1. The order should specify the specific powers to be granted	
Aff. Posting Status Rpt UCCJEA Citation FTB Notice	assets may be performed. Furthermore, Petitioner is concerned that, based on the strained relationship between Andre Forestiere and the rest of the family, there is a risk of waste to the subject property and steps must be taken to secure it.  Petitioner prays the court waive bond: He is the husband and responsible for his deceased spouse's debts. He is a long-time resident of the City and County of Fresno and owns a historical landmark in this City and has substantial assets of his own.  Petitioner understands that one or more beneficiaries may refuse to waive bond based on a well-established history of family disharmony and non-cooperation rather than any real likelihood a bond might be necessary to protect creditors or beneficiaries. Petitioner states the only known asset is the residence, and all other assets are community property. In these circumstances, it is reasonable to spare the Decedent's estate the expense of bond.	damage, waste and injury. (a)(2) Collect all claims, rents, and other income belonging to the estate.  Reviewed by: skc / LEG  Reviewed on: 11-29-12  Updates: 12/3/12  Recommendation:  File 14B - Forestiere	

# Haelee Saenz, Joel Saenz, Juan Carlos Hernandez, Annalia Kathleen Saenz, Abel Sanez, Jaylon Charlie Saenz (GUARD)

Atty Garcia, Alice (pro per – maternal great-grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Haelee, 10	NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		Need Notice of Hearing.
Joel, 7	<b>ALICE GARCIA</b> , maternal greatgrandmother, is Petitioner.	Need proof of personal service at least 15 days
Juan, 4	Father (Haelee): <b>MICHAEL D.</b>	before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u>
Annalia, 3	FELICIANO - Not listed on Petition; however,	Declaration of Due Diligence for: - Michael D. Feliciano (Haelee's father)
Abel, 2	Court records indicate a child support (paternity) judgment	<ul> <li>Juan Carlos Hernandez (Annalia, Abel &amp; Jaylon's father)</li> <li>Dorothy Saenz (mother)</li> </ul>
Jaylon, 1	against Michael D. Feliciano for Haelee.	<ul> <li>Joel &amp; Juan Carlos's father(s) – unknown</li> <li>Need proof of service by mail at least 15 days</li> </ul>
Cont. from	Father (Joel & Juan Carlos):	before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian
Aff.Sub.Wit.	UNKNOWN	of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
√ Verified	Father (Annalia, Abel & Jaylon):	<ul> <li>Paternal grandparents (all)</li> <li>Grace Saenz (maternal grandmother)</li> </ul>
Inventory	JUAN CARLOS HERNANDEZ	
PTC	Mother: <b>DOROTHY SAENZ</b>	
Not.Cred.	MOINGL DOROTH SAENZ	
Notice of Hrg X  Aff.Mail X	Paternal grandparents (all): NOT	
Aff.Pub.	LISTED	
Sp.Ntc.	Maternal grandfather: MAX GARCIA	
Pers.Serv. X	- deceased	
✓ Conf. Screen	Maternal grandmother: GRACE	
✓ Letters	SAENZ	
✓ Duties/Supp Objections	<b>Petitioner alleges</b> the mother is	
Video	currently in Spirit of Woman rehab	
Receipt	and the fathers are not involved in	
✓ CI Report	the children's lives.	
9202	Court Investigator Charlotte Bien	
✓ Order	filed a report on 11/15/12.	Parioused by a IF
Aff. Posting	. , , , ,	Reviewed by: JF Reviewed on: 11/29/12
Status Rpt  ✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15 – Saenz & Hernandez

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 4			TEMPORARY EXPIRES 12-4-12	NEEDS/PROBLEMS/COMMENTS:
			JESUSA MARIA JOSE GUTIERREZ, Stepmother, is Petitioner.	Minute Order 10-16-12: Petitioner informs the Court that both mother and father were provided notice. The Court grants
			Father: <b>ROBERT RENE BOTELLO, SR.</b>	the petition. The temporary expires 12-4-
	Aff.Sub.Wit.		Mother: VALERIE ALEXIS MORENO	12. The general hearing remains set for
~	Verified		Paternal Grandfather: Deceased	12-4-12. Petitioner is directed to file the proof of service for the mother and the
	Inventory		Paternal Grandmother: Deceased	father.
	PTC		Maternal Grandfather: Unknown	
	Not.Cred.		Maternal Grandmother: Unknown	Need proof of personal service of     Notice of Hearing with a copy of the
<u> </u>	Notice of Hrg		Petitioner states the mother hasn't been seen	Petition at least 15 days prior to the
	Aff.Mail	Χ	since his birth. He was given to Petitioner at birth	hearing <u>or</u> consent and waiver of
	Aff.Pub.		and she has raised him since birth. Petitioner states	notice <u>or</u> declaration of due diligence on:
	Sp.Ntc.	Χ	the father left with the child a month ago and they are no longer together. The father is always	- Robert Rene Botello, Sr. (Father)
	Pers.Serv. Conf. Screen	λ	on medication and needs care for himself, so how	<ul> <li>Valerie Alexis Moreno (Mother)</li> </ul>
	Letters	Χ	can he care for the child?	2. Need proof of service of Notice of
~	Duties/Supp	^	Court Investigator Jo Ann Morris filed a report on	Hearing with a copy of the Petition at
	Objections		11-20-12.	least 15 days prior to the hearing <u>or</u>
	Video			consent and waiver of notice <u>or</u> declaration of due diligence on:
	Receipt			- Maternal Grandfather
>	CI Report			- Maternal Grandmother
~	Clearances			Note: Dell'ener file der Note e et Herring
	Order	X		Note: Petitioner filed a Notice of Hearing on 10-11-12 for this hearing; however, the proof of personal service does not indicate that anyone was served-it states "N/A Closed door on me" rather than a name.
				Note: Petitioner states she is in contact with the father, and does list an address for the mother on the original petition. If guardianship is considered, further diligence may be required for notice to the parents and the maternal grandparents pursuant to Probate Code §1511.
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 11-29-12
<u> </u>	UCCJEA			Updates:
<b> </b>	Citation			Recommendation:
	FTB Notice			File 16 - Botello
				16

## Chessa Chapman & John Paul Chapman (GUARD/P) Case No. 12CEPR00886 Quinn, Juanita (Pro Per – Paternal Grandmother – Petitioner) Petition for Appointment of Guardian of the Person (Prob. C. 1510) 17 Atty

John Paul Chapman	TEMPORARY EXPIRES 12-4-12	NEEDS/PROBLEMS/
Age: 13	JUANITA QUINN, Paternal Grandmother, is Petitioner.	COMMENTS:
Chessa Lyrie Chapmar Age: 11	Father: JOHN F. CHAPMAN - Dunlap, CA - Notice dispensed 10-16-12 Mother: TAMMY CHAPMAN	At the temporary     hearing on 10-16-12, the     Court dispensed with     notice to the parents
Aff.Sub.Wit.	- Dunlap, CA - Notice dispensed 10-16-12	until their whereabouts become known.
Inventory PTC	Paternal Grandfather: Deceased Maternal Grandfather: Not listed Maternal Grandmother: Not listed	At this time, the Court may require further diligence and notice to
Not.Cred.    Notice of Hrg   X     Aff.Mail   X	Petitioner states the mother only wants them for the welfare check. She does not care about school or the	the parents and grandparents pursuant to Probate Code §1511.
Aff.Pub. Sp.Ntc. Pers.Serv. X	well-being of the child. Petitioner has a steady place for the child to live and can provide schooling and medical needs.	
✓ Conf. Screen ✓ Letters	Court Investigator Julie Negrete filed a report on 11-27-12.	
Video Receipt		
CI Report     Clearances     Order		
Aff. Posting Status Rpt UCCJEA		Reviewed by: skc Reviewed on: 11-29-12 Updates:
Citation FTB Notice		Recommendation: File 17 - Chapman

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Atty Negret, Jose S

Petition for Probate of Will and for Letters of Administration with Will Annexed

	Tellion to trobate of Will aria for Letters of A	
Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		OFF CALFNIDAD
		OFF CALENDAR. Dismissal entered
Cont. from		on 11/29/12.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 11/29/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18 – Negrete